

Ad-Blockers in Belgium

It just doesn't work !



SECTION 01

Set-up

01

A two-step approach determining the reach & impact of Ad-blockers

1. Online consumer survey

In this first part, we asked consumers from a panel whether they had ad-blockers, and if yes, on which devices, at which frequency did they go online with these devices, etc..

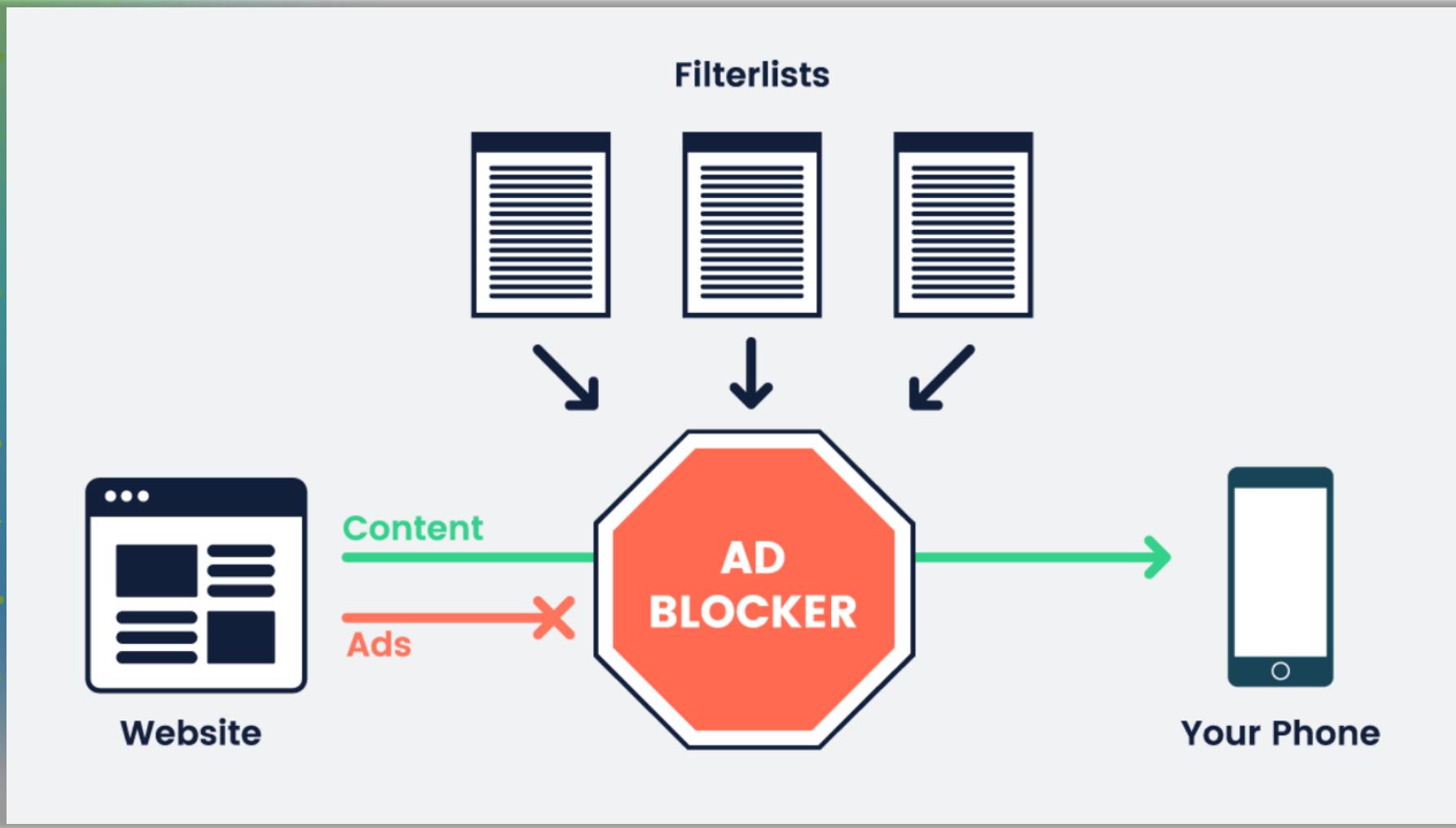
2. Real-live test

Then, we took commonly used Ad-Blockers and checked the 50 most visited websites to see which ones we could still see ads on, if we would see fewer of them, or none.

Methodology of the Online survey

- Interview method : Online survey
- Sample size : 1.400 respondents
- Universe : Belgium 18-59 y.o.
- Period : June – July 2025,
- Weighting : Language, gender, age, social groups, educational level & urbanisation

Quick recap: what's an Ad-Blocker



Methodology of the website tests

1

We selected 3 commonly used Ad-Blockers

Based on the results of the Online Survey, we selected 3 ad-blockers to test

2

We used both Mac OS, Windows OS & Android and iPhone (Brower vs In-App-
And downloaded each of the ad-blockers once at a time

3

We then went through the 50 biggest websites in Belgium

And noted on which we could still see the ads or not

4

We then calculated the impact of the Ad-Blockers
Using the results of our online survey, we then recalculated the reach and the potential impact of the Ad-Blockers



SECTION 02

Survey Results

02

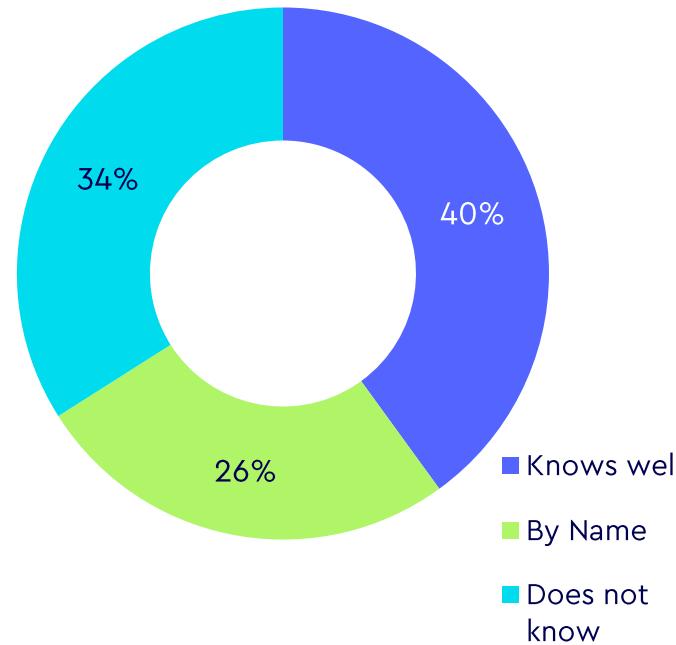
One third of the population has, at least, one Ad-Blocker on one of their devices

34%

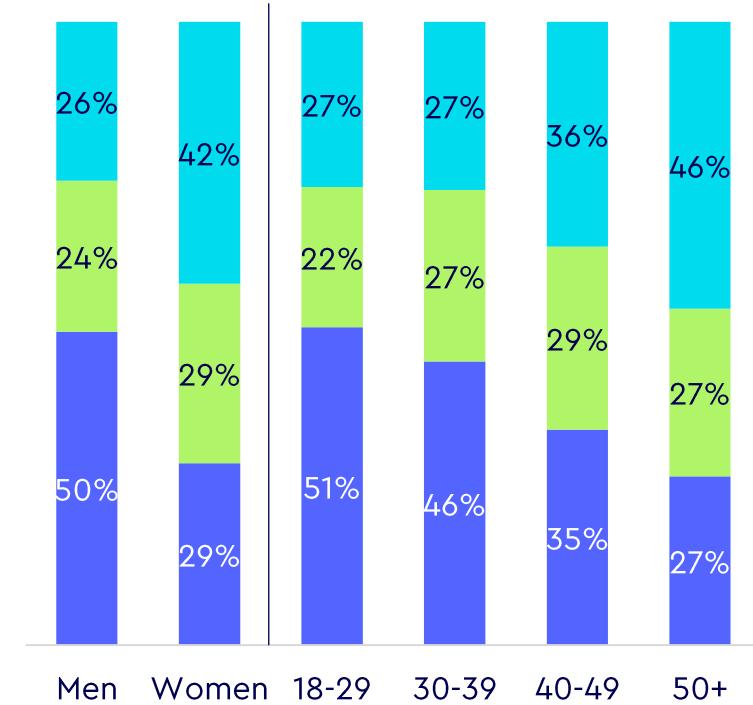
In line with the CIM Establishment survey 1/3 show the intent to block ads from appearing on their screens. For the people who do not have one, the main reason is their lack of knowledge of how to install and use it.

A significant share of the population knows Ad-Blockers well, but a third have never heard of them.

Knowledge of an Ad-Blocker



Split by Gender & Age groups

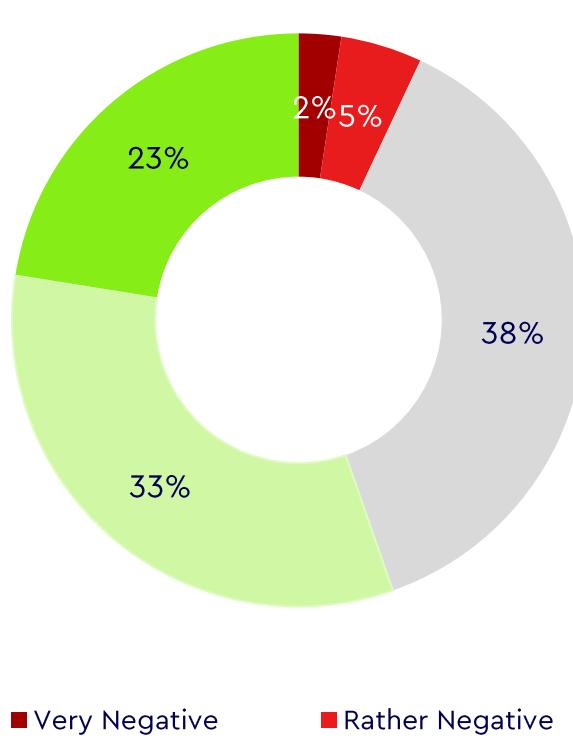


Men are much more likely to know and use Ad-Blockers than women. Also, younger people are more likely to know and use Ad-Blockers.

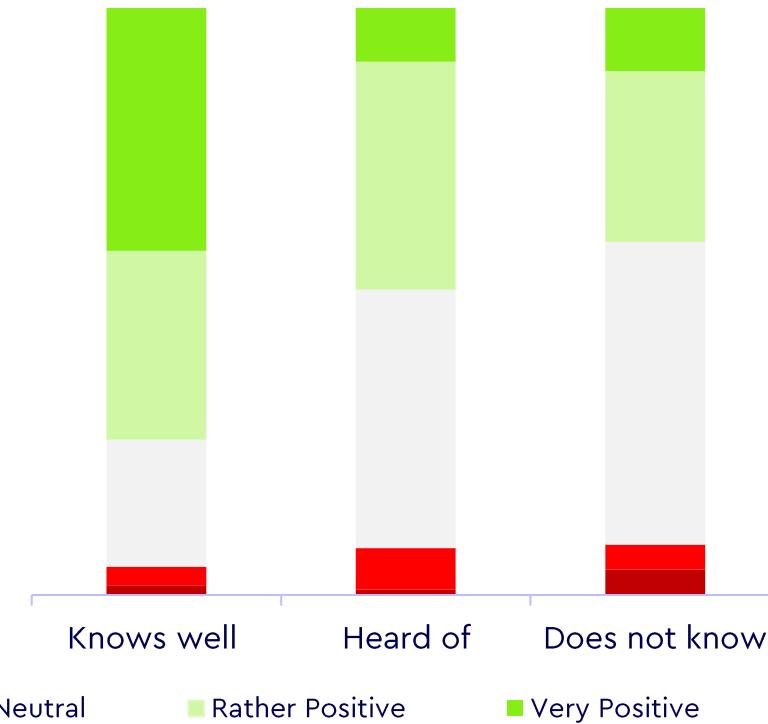
Consumers only see the benefits of using an Ad-Blocker

Position on Ad-Blocker

Total



Split per knowledge of Ad-Blockers



We gave everyone the following definition of what an Ad-blockers is:

Ad blockers are online tools that prevent you from seeing advertisements on web pages, videos, feeds, podcasts, or applications when you browse the Internet.

Most of the population has a positive view of ad-blockers. The people who have a negative view of ad-blockers are those who have a very positive view of ads and their utility in the web economy. 1/3 of the population is neutral, this is for the most the population that has not heard of Ad-Blockers.

24%

Have one installed on
their laptop

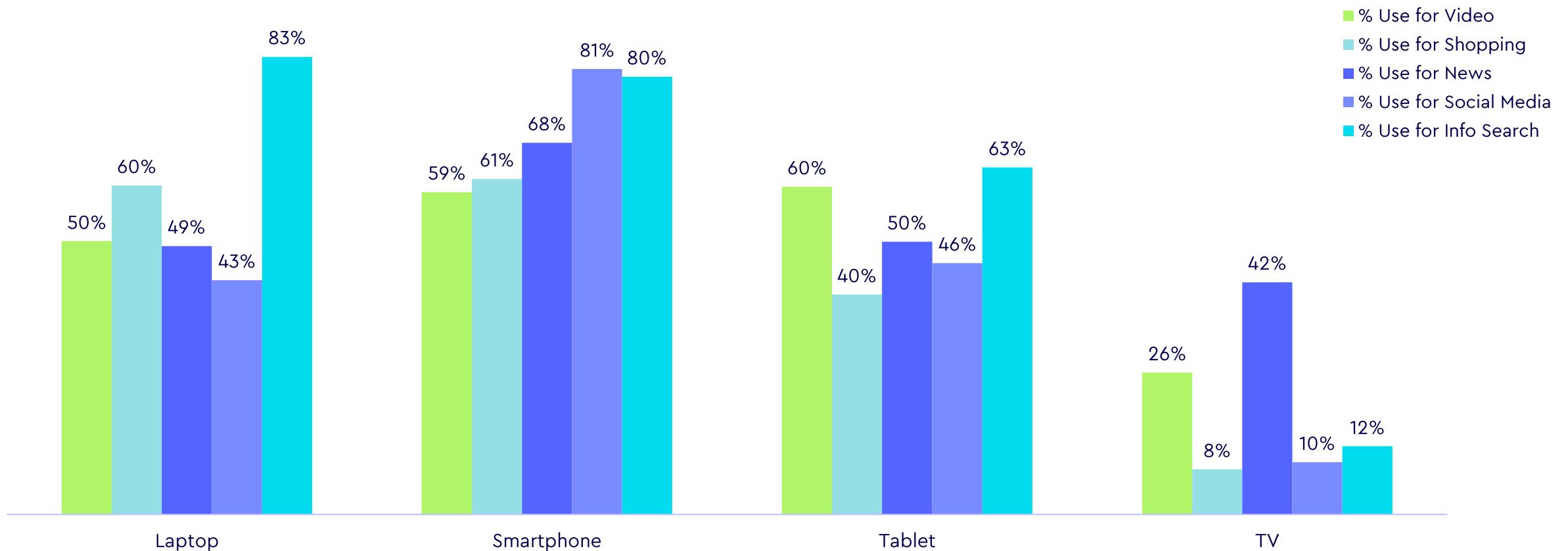
11%

Have one installed on
BOTH their laptop and on
their smartphones

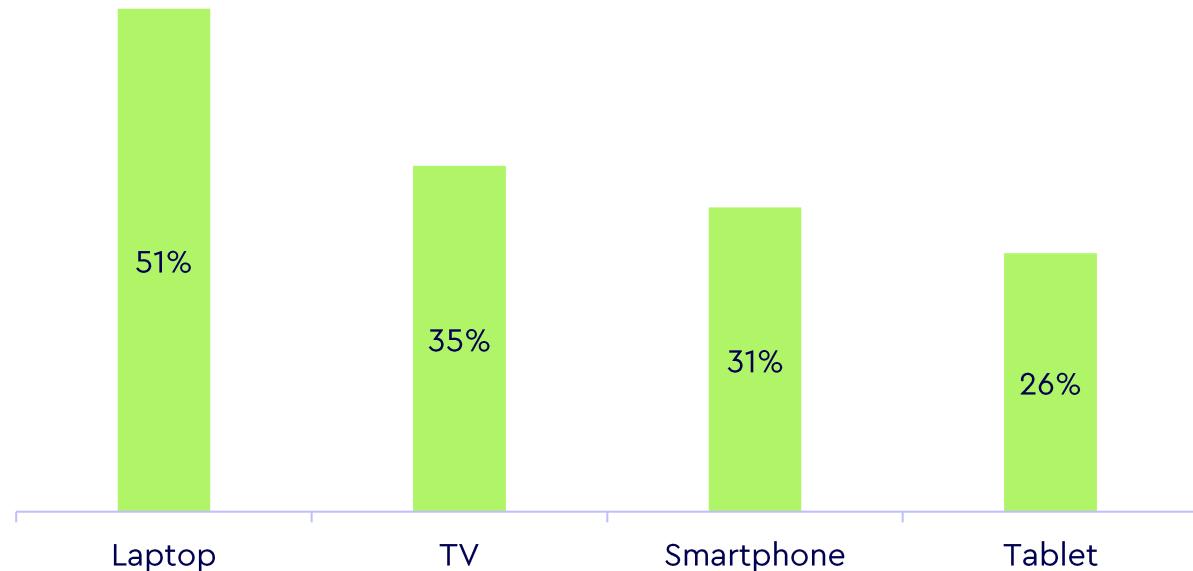
17%

Have it installed on their
smartphone.

Each device has a specific usage



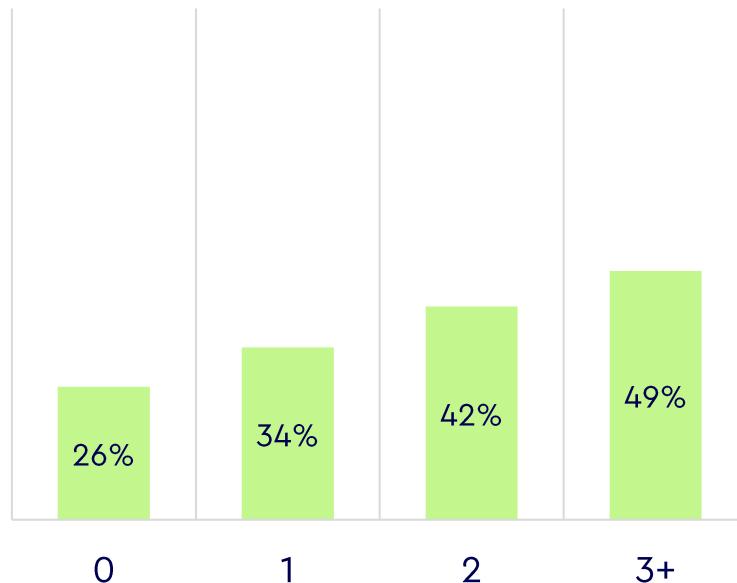
Laptops are most impacted with Ad-Blockers



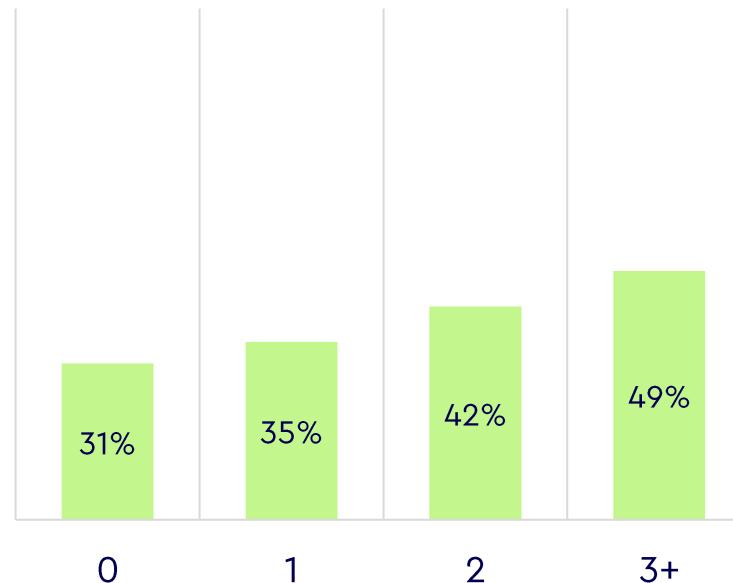
As laptops are most often used for info search, shopping, and some streaming, this is a key piece of 'real-estate' to have ads on the consumers' journeys/ Also the impact on smartphone could be non negligible. But this also shows use that the most often used devices are the ones where the Ad-Blockers are placed

The more people using the internet on a device, the more likely they are to have an Ad-Blocker

Laptop: Hours per day

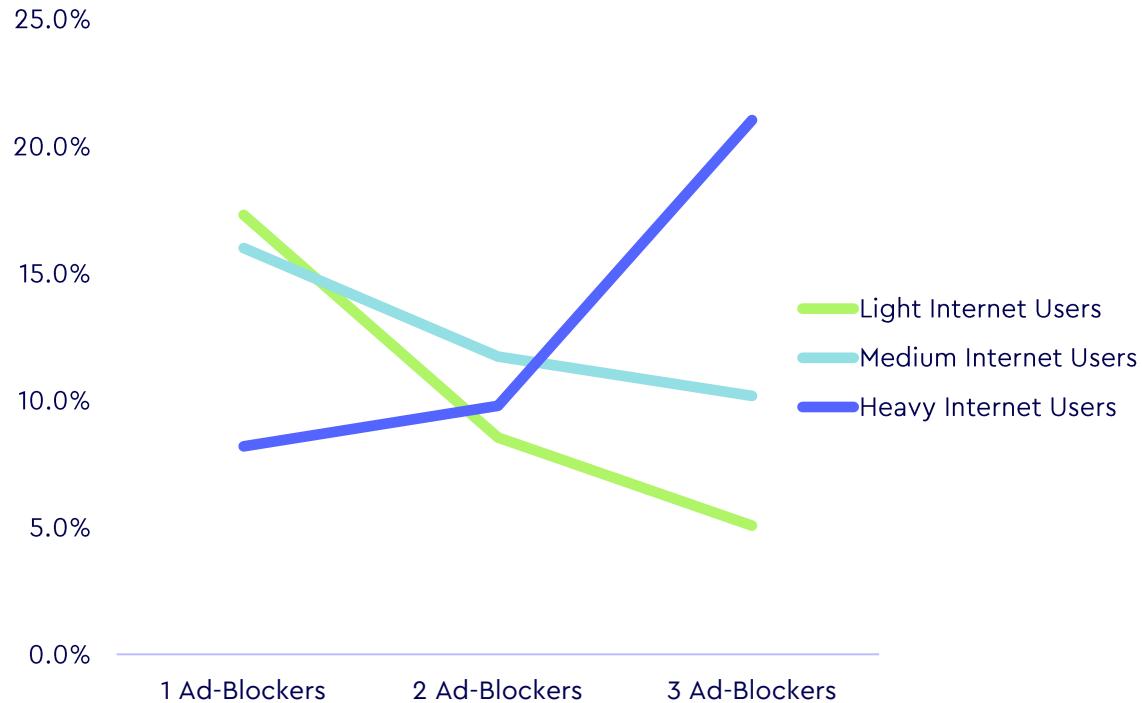


Smartphone: Hours per day

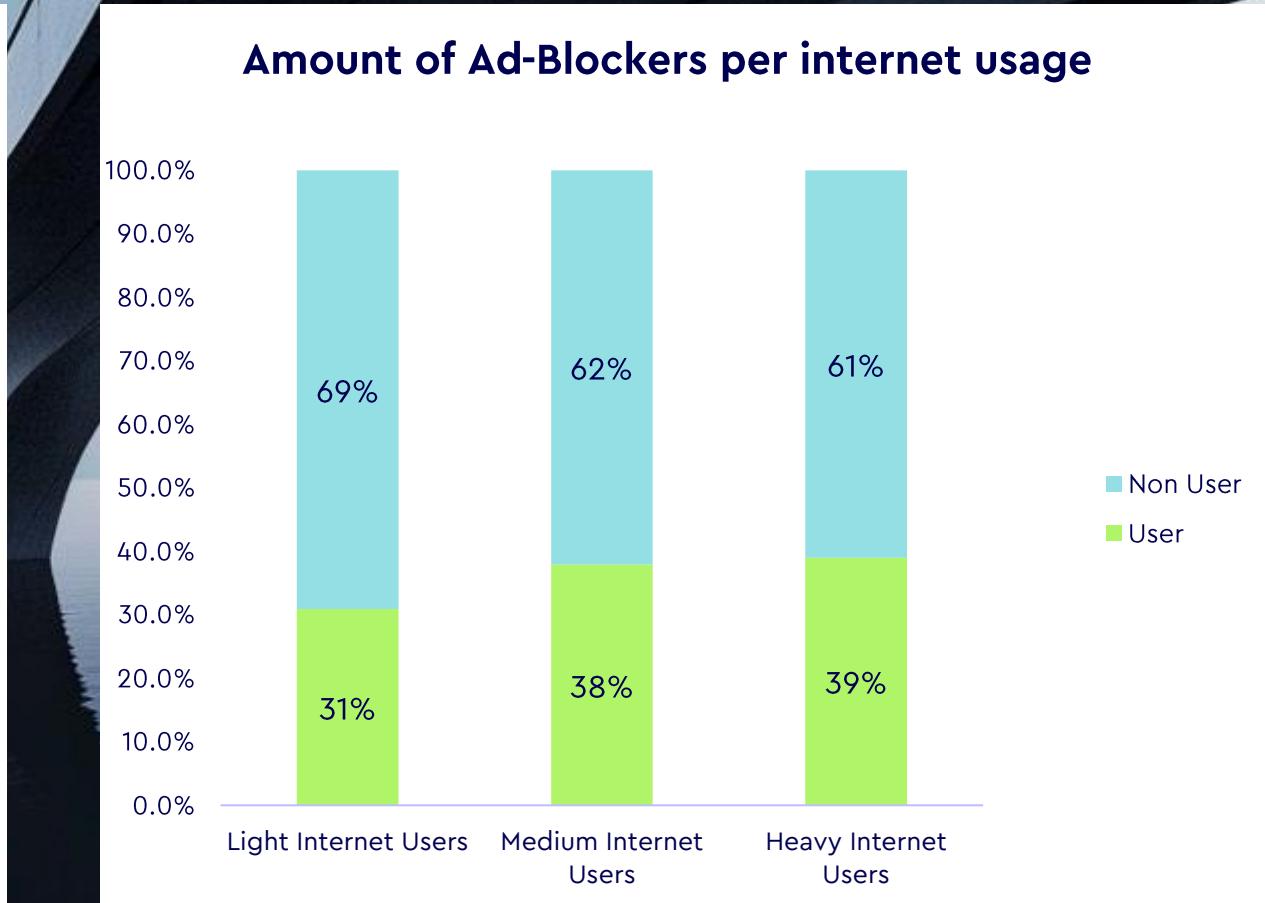


But more than anything, it's young people, who use internet the most

Amount of Ad-Blockers per internet usage



Amount of Ad-Blockers per internet usage



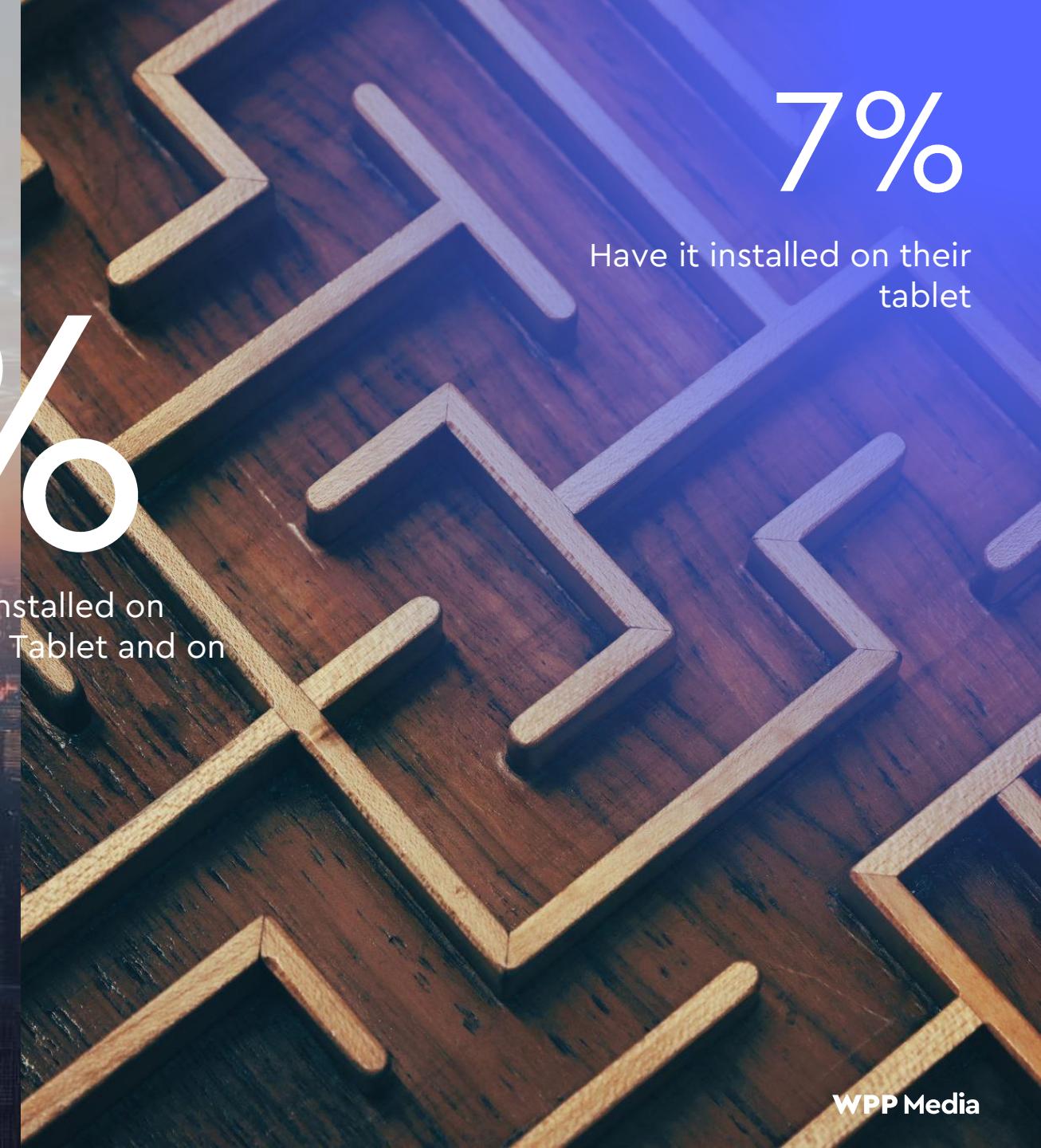


3%

Have one installed on
their TV

1%

Have one installed on
BOTH their Tablet and on
their TV



7%

Have it installed on their
tablet



**The most used Ad-Blocker is AdBlock (+).
People use free Ad-Blockers.**

Ad-Blocker used



The differences are clear between the users and non-users.

The impact of ads on their online experience & their capacity to act on this are the main drivers as to why they would adopt Ad-Blockers.

What do they **disagree** more with?



What do they **agree** more with?



What's an Ad-Block user profile?

01

They want to have the control on who sees what about them.

02

Meaning they have the knowledge to check on how to use them and want to keep some things private.

03

They are weary of what it 'out-there' about them. They want to keep control. For Ad-Block users hyper personalization might not be something they are interested in.



So let's beware of the cycle!

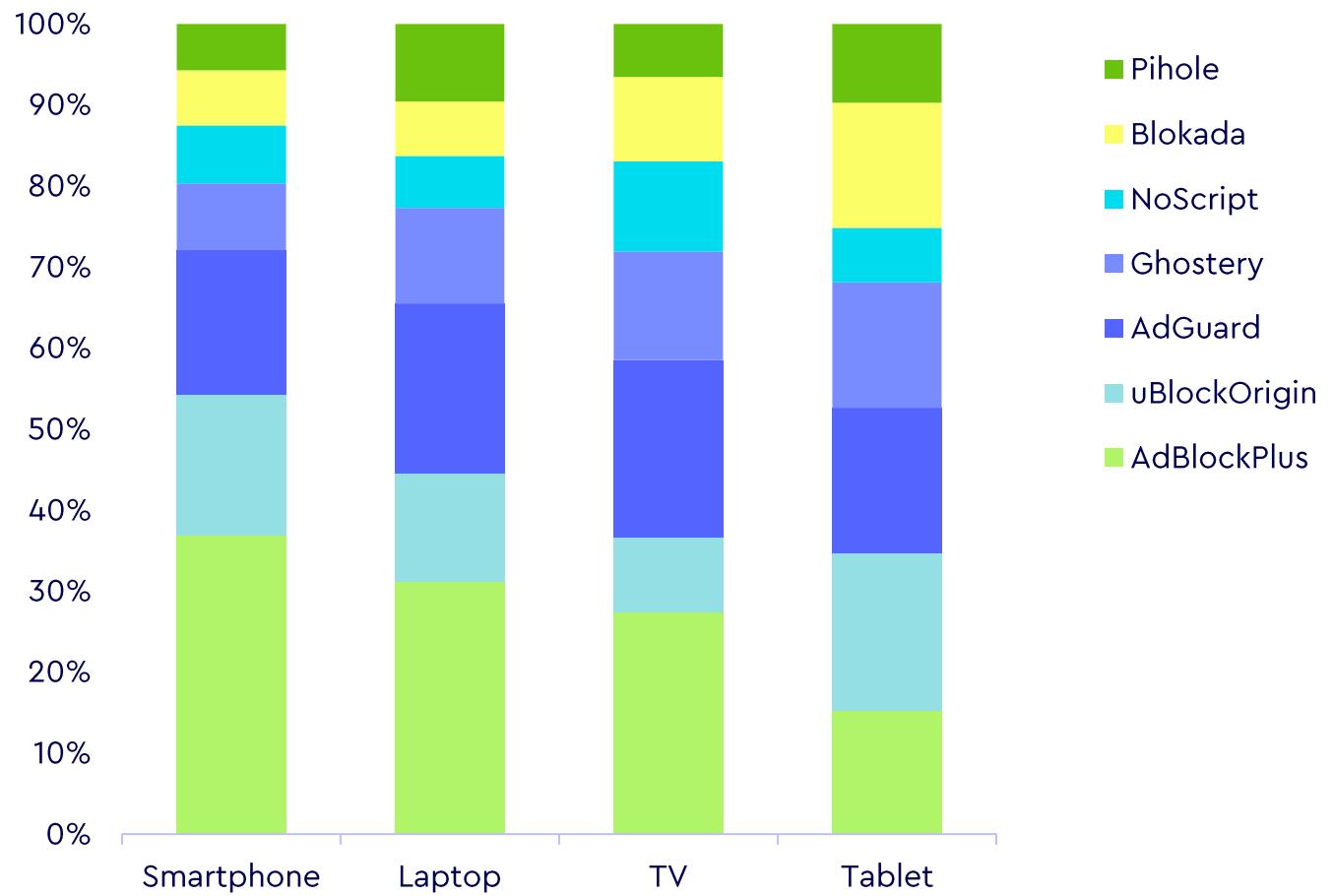
ADS THAT ARE USEFUL, WITHOUT DATA?

Based on our WPPMedia Archetypes, Ad-Block users are people who do want to see ads, but when they are useful to them, to their consumer journey or to the situation they're in. What we've found in the profile in this survey means that we're at risk of a negative cycle:

- People do not want to see an ad that is not useful to them
- They do not want to share their information
- So, we cannot show them ads that are useful to them



They use very different types of Ad-Blockers, and this varies per devices

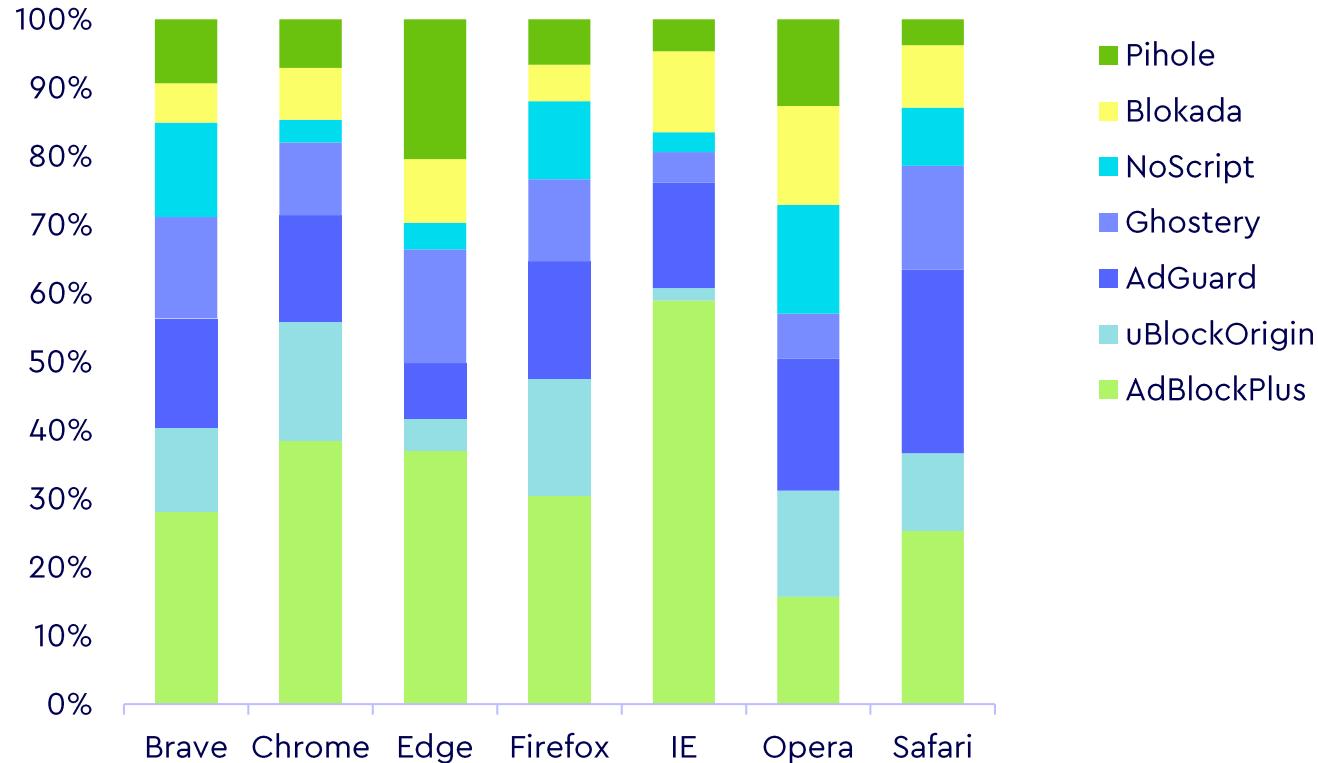


1.2 Ad-Blockers

People most often use 1 Ad-Blocker on one device. This means that the reflex is not specifically to block the ads everywhere, but rather to lower the number of ads they see in one specific location.



Also based on the type of browser they use



1 Browser

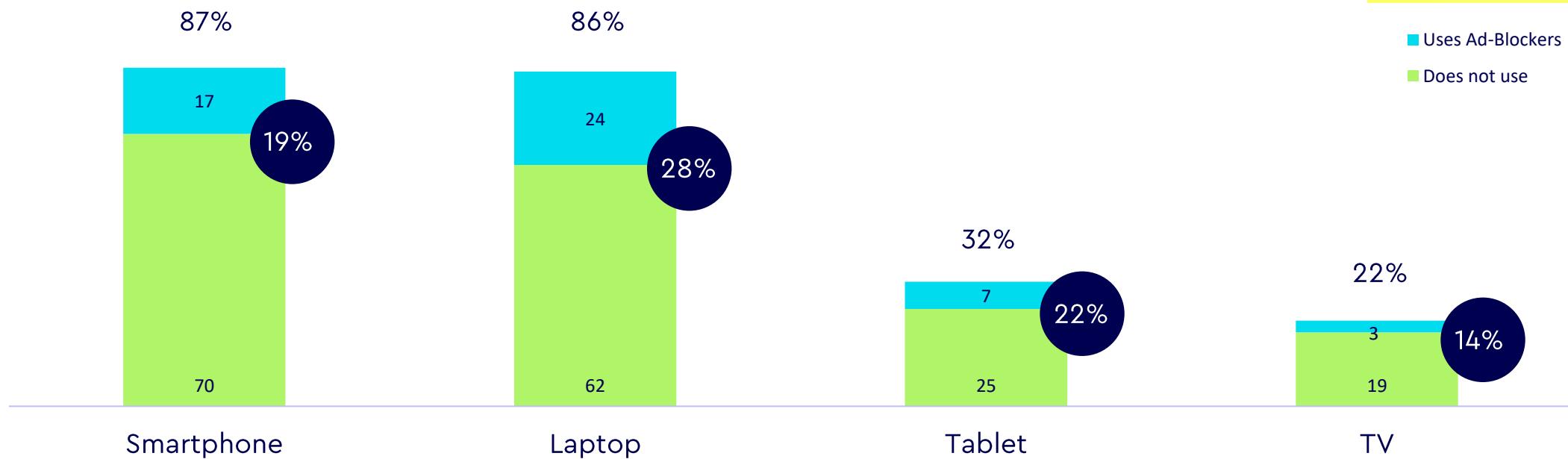
When installing an Ad-Blocker, they install it on 1 browser on average & on one device. This is most often the browser & device that they use most often.



The potential impact of the Ad-Blockers on the devices' reach is more important on laptops.

Probabilized reach of each of the devices with the potential impact of Ad-Blockers

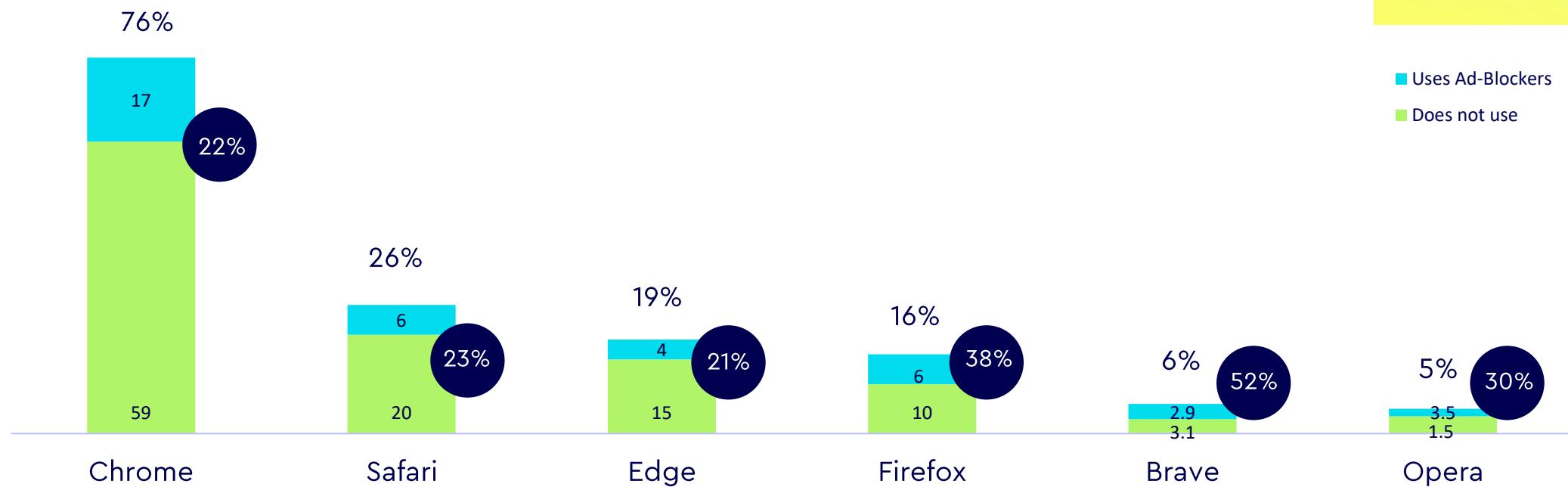
We've here probabilized the potential reach of each device and then looked at how much this device is actively used with Ad-Blockers



The potential impact of the Ad-Blockers on the devices' reach is relatively the same across browsers.

Probabilized reach of each of the browsers with the potential impact of Ad-Blockers

We've here probabilized the potential reach of each browser and then looked at how much this device is actively used with Ad-Blockers



But these Ad-blockers work rather like sieves...

After seeing the initial results, we decided to do an experiment.

Using 2 laptops (Windows vs Mac) and 2 smartphones (Android vs Mac) we went the on the 50 most used websites to check on which we would see ads, on which we did not and/or on which we had to disable our Ad-Blocker

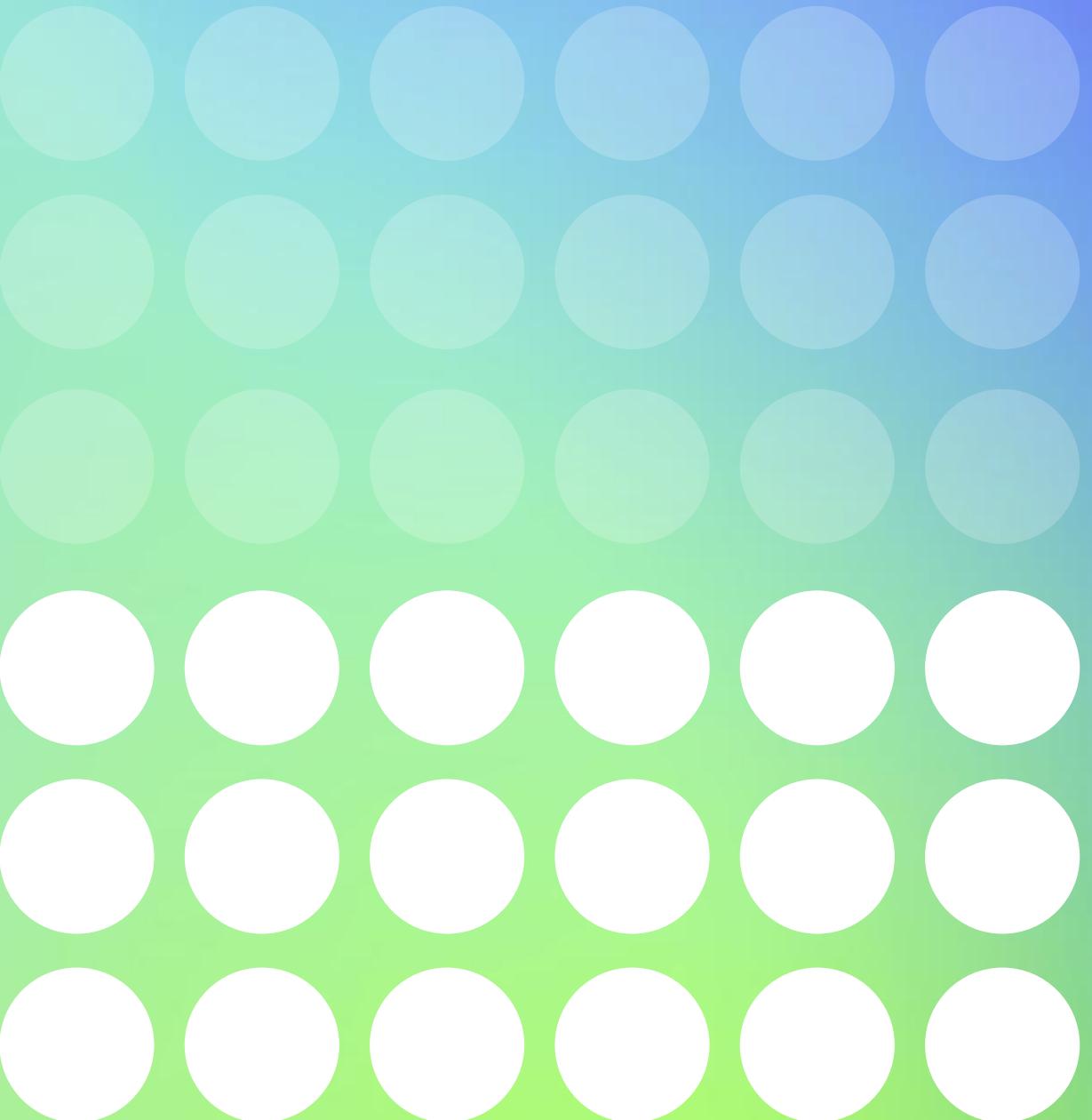
Ad-blocker	Ads are seen	Partially seen	Not seen
Ad-Block (+)	13%	62%	25%
Ghostery	13%	62%	25%
U-Block	13%	21%	67%

Ad-Blockers do work, but they 'only' block 39% of the ads that we are exposed to. As people that are using Ad-Blockers are heavy users, this means they are still exposed to ads, this brings the number down to where the Medium and Light users are.

On top of that, websites
have been working on
fighting Ad-blockers and...

50%

Have managed to implement a solution that
successfully makes the users disable their ad-
blockers online if they want to use their
websites.





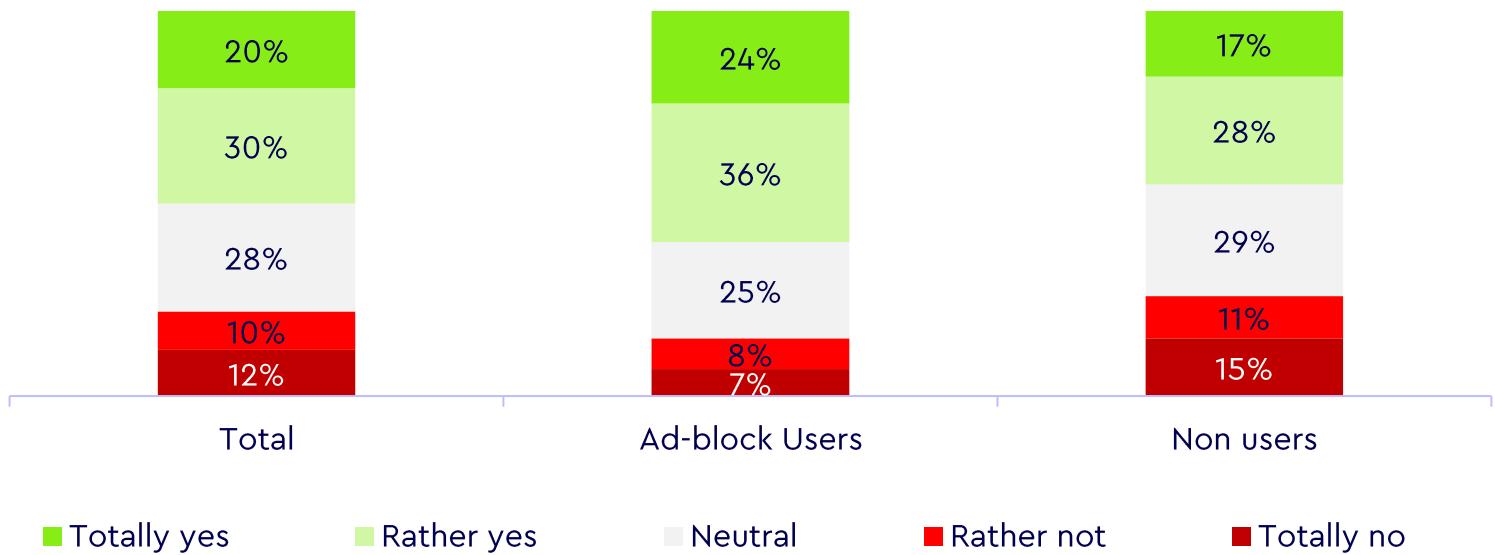
This means that :

Education about ad revenue will not necessarily reduce adblocker use; the best-informed users are often the most likely to block ads.

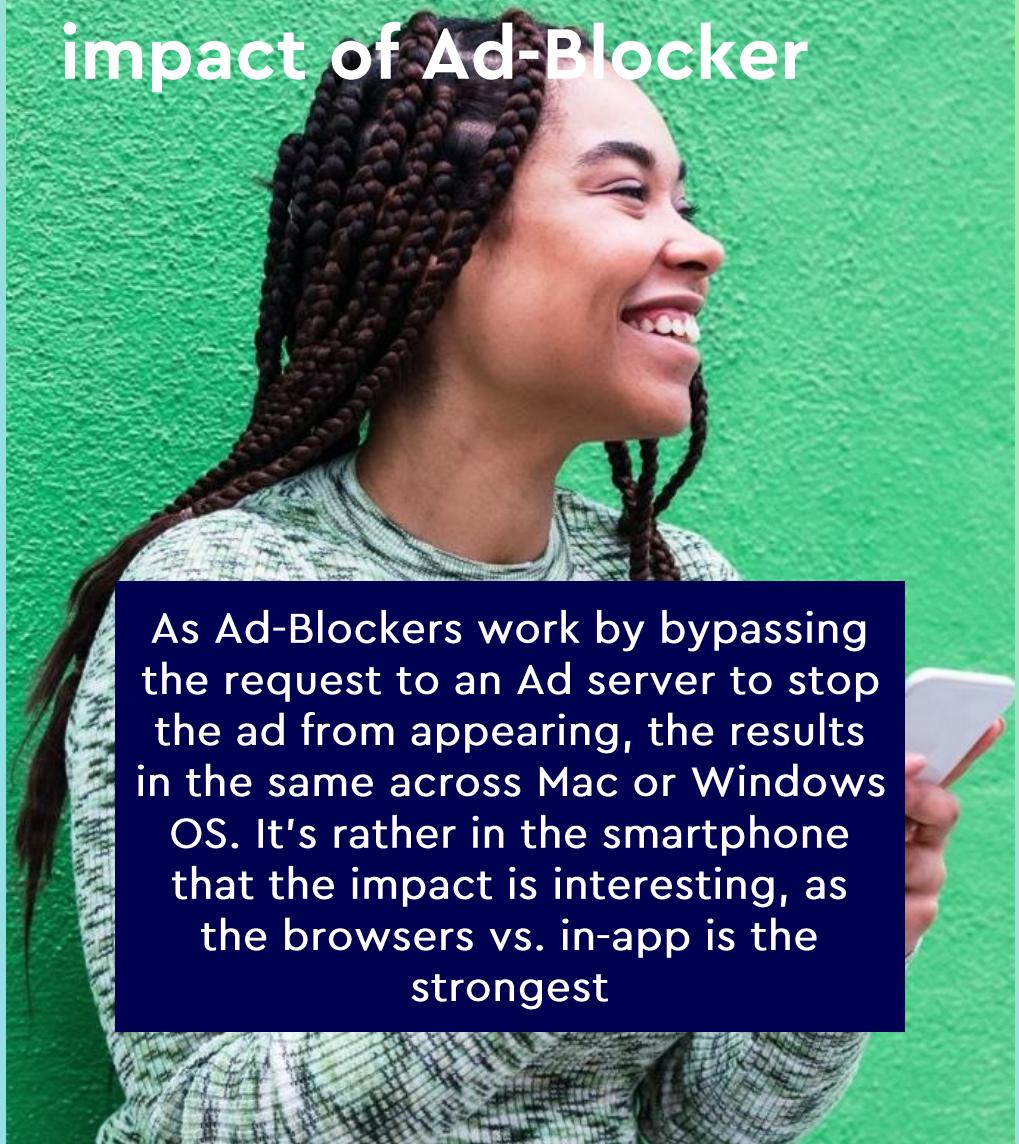
Appeals to "support free content" are unlikely to sway the most active Ad-Block users.

People tend to understand the need to have ads to finance a website

Do people understand that websites need ads to finance themselves ?

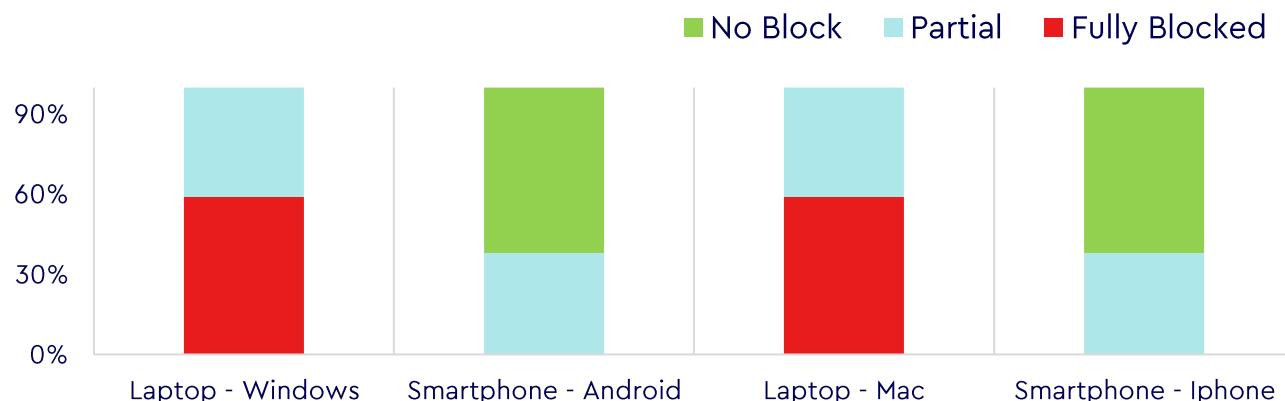


Some details on the impact of Ad-Blocker

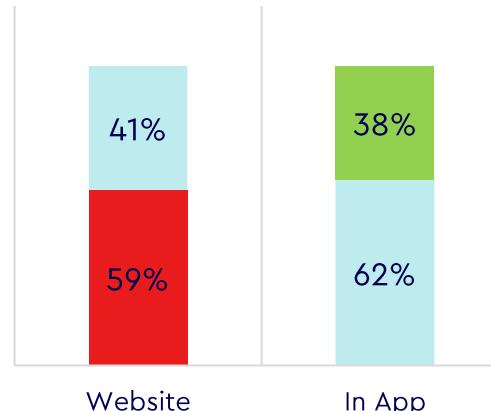


As Ad-Blockers work by bypassing the request to an Ad server to stop the ad from appearing, the results in the same across Mac or Windows OS. It's rather in the smartphone that the impact is interesting, as the browsers vs. in-app is the strongest

Type of OS most impacted



Smartphone: Web vs In-app



BVODs' impact

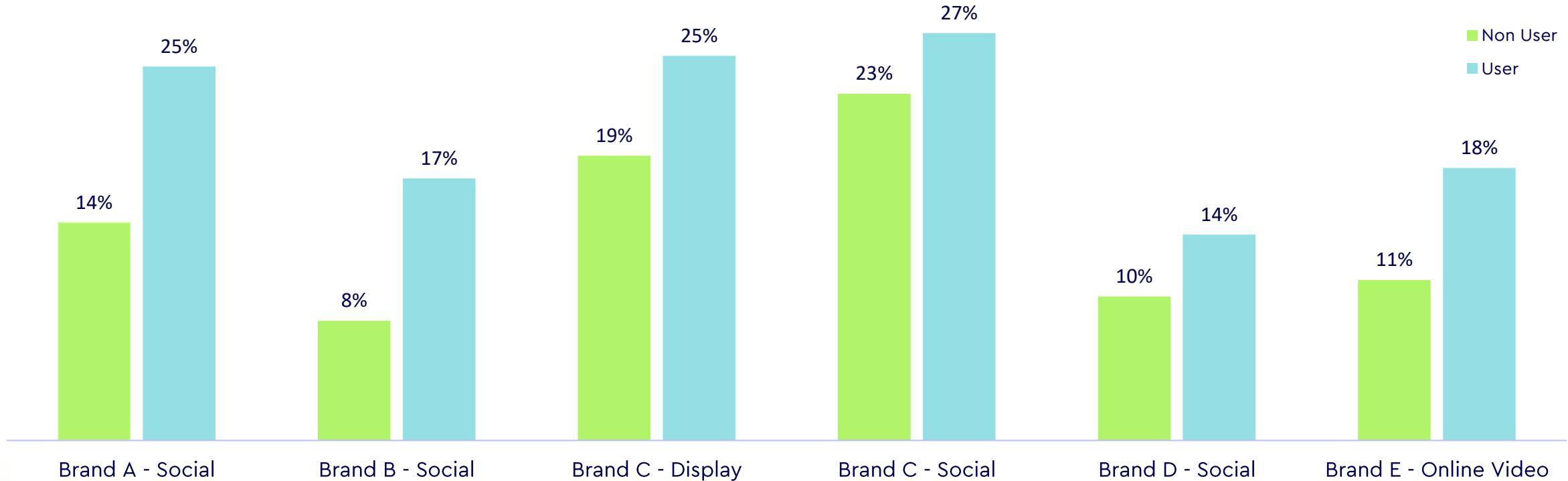
100%

Of BVODS have established an efficient Anti-Ad-Blocking method

**Do Ad-Blockers then have
any impact on the
recognition of ads?**

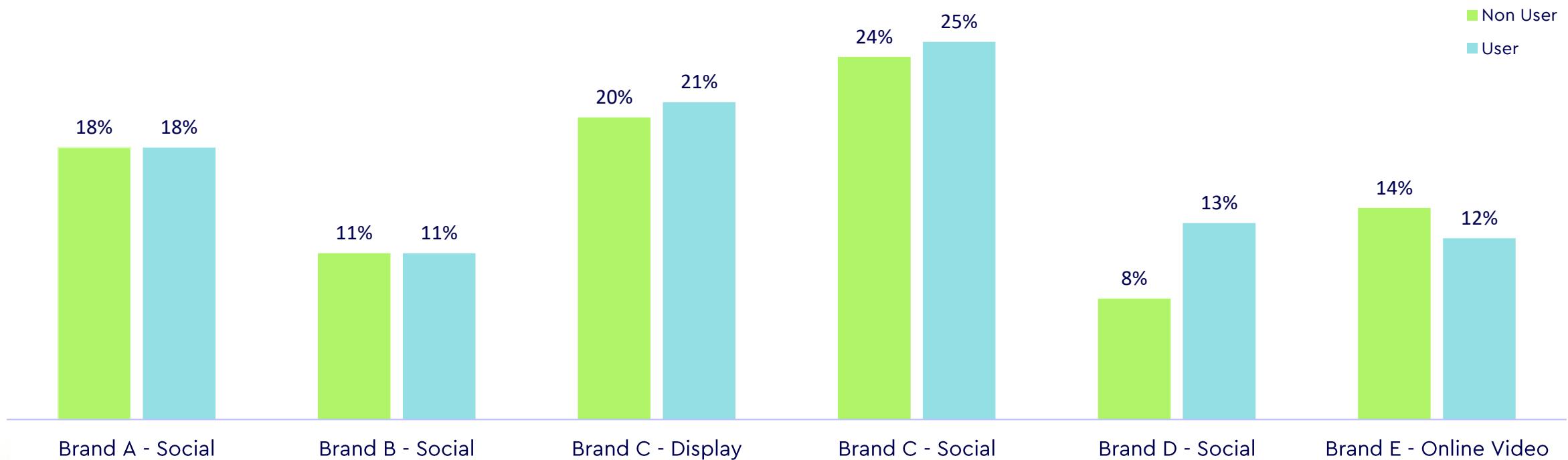
If there is a loss, then it's hard to see where ?

The reason we do not see a loss is that the real impact of Ad-Blockers is to lower the amount of time people see an ad. This makes it so the group that uses Ad-Blockers is 'just' seeing the same number of ads as people who use the internet less often.



But what if people are close to the brand?

We also tested by neutralizing how close people are to a brand and see that the recognition scores remain in line whether people use an Ad-Blocker or not.



 SECTION 03

Conclusions

03

3 Key takeaways:

34%

Are using Ad-Blockers, ad-blocker users are heavy, tech-savvy internet users who primarily seek control and privacy, but they do not block ads everywhere.

39%

Ad-blockers act more like filters than walls, blocking about 39% of ads, while anti-ad-blocking measures and selective device/browser use mean many ads still reach their audience.

Limits, not blocks

The main effect of ad-blockers is to reduce ad frequency, not to eliminate campaign impact or recognition in campaign results that remains largely intact.



Thank you !